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Poultry Programs

Market News Branch and Analysis

Thailand Poultry and Products Update

Thai broiler production is expected to be flat in 2007. High stocks at the end of 2006 created an oversupply situation for the Thai broiler industry in the first few months of 2007. It has also caused lower prices for day-old chicks and live broilers. Due to the current situation broiler processors are reducing weekly production from 18-19 million birds per week to about 16-17 million. A bounce back in production is expected in late 2007 back to about 18-20 million birds per week.

Along with the oversupply situation, which caused lower chick and broiler prices, the price for corn is skyrocketing and causing more losses.

Domestic chicken meat consumption in Thailand is expected to increase in 2007. Reasons for the increase include improved consumer confidence in the safety of cooked chicken and competitive prices for chicken meat.

Thai exports of broiler meat are expected to rise in 2007 by 7% over 2006 levels to a total of about 280,000 pounds. Japan and Europe will be major importers of Thai chicken meat. The EU recently passed new tariff quotas for chicken meat imported from major suppliers like Thailand and Brazil that will increase the amount of product Europe will get from these countries.

Thailand has had problems with AI periodically since 2004. Thailand's government offices and integrated broiler processors do claim that even though they have had outbreaks of the H5N1 type of AI the disease has not affected any broiler farms. AI vaccines are prohibited in Thailand but the country does have stringent biosafety surveillance and controls that have prevented the disease from reaching their broiler farms. The Thai Ministry of Agriculture has recently cited that AI vaccinations may be implemented as a backup measure to help control large outbreaks of AI that may occur in the future. Thailand is also working with Vietnam to design better ways to prevent and control AI outbreaks within their counties. The plan is expected to improve the AI situation in both countries tremendously. The latest outbreak of AI in Thailand occurred on March 20, 2007 in domestic chickens raised on a farm in Mukdahan. The entire flock was culled to prevent spread of the disease.

Source: FAS/Other News Sources

****Thailand Poultry Exports**** (Metric Tons)

HS Code	2006	2004	2005	2006
Cuts 1/	370,351	26,548	4,534	74
Prepate 2/	126,984	174,268	234,902	251,663

1/ HS Code 0207 fresh and chilled poultry cuts
2/ HS Code 1602 prepared or preserved poultry meat

Source: Thailand Customs Department

US Poultry Meat Exports to Select Asia Countries

	(Metric Tons)				
Country	2004	2005	2006	Jan-06	Jan-07
China	23173.1	166397.7	408100.7	19770.4	49859.5
Hong Kong	202425.6	127429.6	80607.5	7789.3	5523.7
Japan	31871.8	28528.6	28137.1	1965.9	2092.7
Korea	0.0	0.0	0.0	0.0	0.0
Philippines	17207.0	12097.7	20282.4	541.7	1936.0
Singapore	11705.9	14264.5	15591.6	504.4	1021.6
Taiwan	56121.8	87210.7	87389.0	13662.4	2421.3

Source: FAS

****Japan Imports of Frozen Broilers By Fiscal Year (04/01 - 3/31)****

	(Metric Tons)				
	2002	2003	2004	2005	2006
China	119,090	42,438	925	780	779
U.S.	49,571	41,094	31,541	28,370	28,369
Thailand	166,973	146,252	68	54	53
Brazil	153,245	193,955	323,260	394,325	394,326
Others	4,034	5,533	9,468	9,923	9,922
Total	492,913	429,272	365,262	433,452	433,449

Source: Agriculture and Livestock Industries Corporation (ALIC)

Cumulative U.S. Meat and Livestock Trade

Ready to cook, 1,000 lb

Broiler exports	2005	2006	Jan-06	Jan-07
Japan	62,777	62,924	4,858	4,535
Mexico	522,454	457,647	42,644	43,126
Hong Kong/M. China	347,659	640,618	37,343	67,682
Singapore	94,452	98,050	6,507	6,294
Canada	229,537	237,904	20,083	25,337
Russia	1,681,338	1,599,019	146,832	70,304
CIS (without Russia)	384,994	329,550	37,894	41,233
Eastern Europe	218,804	123,431	10,209	266
Baltic countries	176,076	202,309	-	28,346
Caribbean	342,841	345,417	28,148	35,262
Other	1,141,797	1,175,167	91,284	73,992
Total	5,202,730	5,272,034	425,801	396,376

Turkey exports

Mexico	353,759	310,824	27,058	25,606
Canada	27,620	21,914	1,334	1,759
South Korea	4,913	6,867	356	370
Russia	20,009	25,240	314	797
Hong Kong	11,560	18,203	777	812
China (Taiwan)	19,770	17,990	843	762
Other	131,919	145,205	6,207	11,690
Total	569,550	546,243	36,888	41,797

Shell egg exports

1,000 doz.

Canada	36,367	29,839	1,224	1,314
Hong Kong	22,669	21,621	2,142	2,652
Mexico	6,776	15,247	823	1,071
Caribbean	13,614	14,883	1,083	1,105
Other	25,547	26,827	1,175	5,317
Total	104,973	108,416	6,446	11,460

Source: USDA/ERS

INSPECTED EGG PRODUCTS-**U.S. & CANADA IMPORT/EXPORT TRADE****U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending March 24, 2007			Year-To-Date	
TYPE	2007	2006 1/	2007 2/	2006
Liquid	336	156	1,674	2,243
Frozen	0	0	5	40
Dried	1	0	169	146
Total	337	156	1,848	2,429

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending March 24, 2007			Year-To-Date	
TYPE	2007	2006 1/	2007 2/	2006
Liquid	225	22	3,923	660
Frozen	0	0	113	201
Dried	35	0	191	41
Total	260	22	4,227	902

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending March 24, 2007			Year-To-Date	
TYPE	2007	2006 1/	2007 2/	2006
Jumbo	0	0	0	150
Extra Large	1,550	2,910	5,189	15,390
Large	4,180	2,980	16,661	18,135
Medium	1,860	1,500	9,575	16,475
Ungraded	2,300	8,100	12,680	16,610
Misc	0	210	85	1,020
Total	9,890	15,700	44,190	67,780

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News & Analysis Branch.

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

March 30, 2007				
CHICKEN WITH SKIN ADDED				
---- PRICES ----			---- VOLUME ----	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	16.00-20.00	-	160,000	-
WTD AVERAGE	19.00			
15-20%				
RANGE	15.00-19.00	12.00-15.50	1,757,000	524,400
WTD AVERAGE	16.93	12.98		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

U.S./CANADIAN LIVE POULTRY SLAUGHTERED UNDER INSPECTION

W/E 24-Mar-07 (PRELIMINARY)

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,115	1,138	2,253
Last Week	1,223	1,220	2,443
Same week yr ago	1,082	1,562	2,644
To-date/2007	13,340	16,081	29,421
To-date/2006	14,597	17,219	31,816

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	192	0	192
Last Week	293	0	293
Same week yr ago	144	0	144
To-date/2007	2,558	14	2,572
To-date/2006	3,012	7	3,019

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Total U.S. Fowl slaughtered in the U.S. and Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,307	1,138	2,445
Last Week	1,516	1,220	2,736
Same week yr ago	1,226	1,562	2,788
To-date/2007	15,898	16,095	31,993
To-date/2006	17,609	17,226	34,835

Source: USDA/AMS Poultry Programs, Market News & Analysis Branch

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

March 30, 2007				
CHICKEN WITH SKIN ADDED				
---- PRICES ----				
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	16.50	16.00-17.00	661,800	260,800
WTD AVERAGE	16.50	16.40		
15-20%				
RANGE	16.00-21.00	11.00-16.00	1,701,000	780,000
WTD AVERAGE	17.10	13.74		
20% OR MORE				
RANGE	-	14.00	120,000	-
WTD AVERAGE		14.00		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS INCLUDING BULK MEAT and FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 30 MARCH, 2007.

The market tone on white meat was steady to firm. Demand moderate to good with offerings short to light for buyers' needs. The market tone on consumer sized rib breasts was steady to fully steady. Demand light to moderate for the light offerings. The market tone on thigh meat was mostly steady. Demand light for the light to adequate offerings. The market tone on mechanically separated turkey (MST) was steady to fully steady. Demand light to moderate for the light to adequate supplies. Most processors running shortened holiday processing schedules next week. Firm priced trading slow to moderate, open priced heavy and centered on fresh tom drums for export. For domestic: frozen 40 lb. ground turkey -90% lean 52 shipping point, fresh scapula 103-117 mostly 106-108, fresh young hen breast meat 214, fresh breast trim 111, Grade A non-basted rib breasts - 8-10 lb. 130, 12-16 lb. 190 cents delivered. For export: livers 19 shipping point, frozen -20% MST +30 days age 16, fresh tom drums 49, fresh thigh meat 93, frozen Russian thigh meat 100 cents delivered.

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
FRIDAY, MARCH 30, 2007						
DRUMSTICKS, TOMS	50.00-51.50		51.00	120	50.63	160
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM	50.00-55.00		51.67	156	51.67	156
TAILS	25.00		25.00	240	25.21	280
MECHANICALLY SEPARATED 2/	22.00		22.00	104	22.00	104
THIGH MEAT - FROZEN	89.00-91.00		89.89	273	89.80	353

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
THURSDAY, MARCH 29, 2007				
DRUMSTICKS, TOMS		T	49.50	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM		F	52.00	156
TAILS		T	26.50	40
MECHANICALLY SEPARATED 2/		F	20.00	120
THIGH MEAT - FROZEN	89.50		89.50	40

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
WEDNESDAY, MARCH 28, 2007				
DRUMSTICKS, TOMS		T	49.50	40
WINGS FULL-CUT - TOMS		W	33.00	72
WINGS, V-TYPE, TOM		F	52.00	156
TAILS		T	26.50	40
MECHANICALLY SEPARATED 2/		F	20.00	120
THIGH MEAT - FROZEN	89.50		89.50	40

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
TUESDAY, MARCH 27, 2007				
DRUMSTICKS, TOMS	49.50		49.50	40
WINGS FULL-CUT - TOMS		W	33.00	72
WINGS, V-TYPE, TOM		F	52.00	156
TAILS	26.50		26.50	40
MECHANICALLY SEPARATED 2/		F	20.00	120
THIGH MEAT - FROZEN		R	90.00	52

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
MONDAY, MARCH 26, 2007				
DRUMSTICKS, TOMS		W	51.25	160
WINGS FULL-CUT - TOMS		W	33.00	72
WINGS, V-TYPE, TOM		F	52.00	156
TAILS		W	29.00	120
MECHANICALLY SEPARATED 2/		F	20.00	120
THIGH MEAT - FROZEN		R	90.00	52

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.